

Application for cash payment of the termination benefit – self employment

Personal data

Account Number: _____

Surname: _____

First name: _____

Date of birth: _____

E-Mail: _____

Address: _____

Postcode, Place: _____

Social Insurance-No.: _____

Nationality: _____

Data for payment

The entire of the termination benefit is to be used as follows:

IBAN No.: _____

In favour of: _____

SWIFT-Code: _____

Bank: _____

Address / postcode / place: _____

Remark: The beneficiary account must be in the name of the pension account holder or in the name of a joint-account with the spouse.

The transfer must be made to a Swiss Bank account.

- I confirm with my signature stated below, that I am taking up a self-employment and am not under control of the pension plan anymore.
- I confirm with my signature stated below, that I did **not make** any **purchase** in the pension fund the last three years.
- I have **made purchases** in the pension fund the last three years (enclose statements of purchases or declare on a separate list all purchases with date and amount).

In accordance with the latest legal practice, the retirement assets must remain in their entirety within the pillar 2 cycle for a period of three years after the most recent purchase of additional benefits.

In addition, the pension fund recipient confirms emphatically with his signature stated below, that the statement claim of benefits enforced fact is the absolute truth and takes notice, that with the cash payment all rights to the pension benefit are achieved.

Place / date: _____

Signature of the pension account holder

Place / date: _____

*Signature of the spouse

Married people or people in a registered partnership need to have both signatures certified by a notary in Switzerland or by an embassy on this form.

Please enclose the following documents:

- Confirmation of the AHV-compensation office
- Copy of passport or other ID with readable signature (if married, of both spouse)
- Current confirmation of residence
- **For married people:** Copy of the official marriage certificate or family register
- **For persons in a registered partnership:** copy of the partnership certificate
- **For single persons:** actual confirmation of marital status